

## 2020 Personal Tax Checklist

Please submit documents for any item that you check off below.

### INCOME

- T3 Investment Income
- T4/T4A -Employment Income or Commission Income
- T4A-P/T4A-OAS Canada Pension/Old Age Security Pension
- T4A-CERB/T4A-CRB Canada Emergency Response / Canada Response Benefit
- T4E Employment Insurance Income
- T4RIF Registered Income Fund Withdrawals
- T4RSP RRSP Withdrawals
- T5 Dividend and Interest Income
- T5007 Workers' Compensation Benefits
- T5008 Statement of Securities Transactions including gain/loss summary report from your financial institution
- T5013 Limited Partnership Income
- Rental Income/Expenses—see form T776 on our website
- Self-employed (small business) income—see worksheet on our website
- Foreign Income including pension income from other

### CREDITS AND DEDUCTIONS

- Charitable donations and political contributions
- RRSP Contributions made in 2020 and up to March 1/2021
- Child care expenses
- Union or professional dues
- T2200 & employee expenses (form T777 on our website)
- Medical expenses for all family members
- Interest paid on loans for investment purposes
- Moving expenses incurred as a result of a change in job/school
- Home Buyers Plan withdrawals and repayments
- T2202A Tuition fees paid
- Spouse and dependents' income and expenses
- Adoption or fertility treatment costs
- First time homebuyers tax credit

### IDENTIFICATION—Please check if:

- You are **NOT** a Canadian Citizen
- You owned foreign property of more than \$100,000
- You are a U.S. Citizen
- You do **NOT** want to be identified to Elections Canada for its records

### MISCELLANEOUS ITEMS

- Spousal/child support paid/received in 2020
- Change of marital status (please provide date of change)
- Employee stock option information
- Eligibility for the Disability Tax Credit
- Tax instalments paid towards 2020 income tax
- Sale of Principal Residence (please see form on our website)
- Property tax or rent paid in 2020
- Sale of stocks/bonds/mutual funds/real estate
- Tradesperson's tools and expenses
- Teacher/ECE educator school supply expenses

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